Magazine for the European Self-Adhesive Tape Industry

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Afera News

Association des Fabricants Européens de Rubans Auto-Adhésifs

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IN THIS ISSUE

PRESIDENT'S PAGE

With Afera's Barcelona Conference still fresh in my mind, I submit to you my first written contribution to *Afera News*. The Conference was of great personal significance to me, because it was my first as Afera's President and it took place in my hometown of Barcelona. It was also significant for Afera. If you look up the word 'association' in Princeton University's WordReference Dictionary, you'll find eight definitions. Two of them:

The act of consorting with or joining with others.

The process of bringing ideas or events together in memory of imagination; conditioning as a form of learning by association.

Within the context of these definitions, my personal evaluation of the Conference is as follows: I am grateful for the largest turnout *ever* at an Afera event, representing three continents. The working programme was well-organised, balanced in topic and interesting. Delivered by brilliant speakers, the lectures received the highest ratings *yet* at an Afera Conference.

The Marketing and Technical Committees deserve our deepest appreciation for their efficient, dedicated work, along with Lejeune Association Management. They make it possible to ever build on our successes. In this respect, your views and suggestions for improvement on this or any of Afera's activities or services are greatly valued.

I would like to highlight once again the initiatives which were touched upon at our meeting in Barcelona. Working toward these will prevent us from suffering from the 'if you do not grow, you die' effect, which I touched upon in the Conference's opening lecture.

Following the resounding success of our Technical Committee in obtaining the certification of our three test methods as ISO norms, we are all the more motivated to work together on similar issues with our counterpart associations, such as the PSTC and JATMA, pressing ahead toward ISO approval of Thickness and further strengthening our position in the global industry.

Our MKC continues to work with its usual high degree of efficiency. This is seen in the improvement of our market survey with the help of our new partner company The Martec Group, enabling us to work even more closely with the PSTC. The MKC is also working diligently in other areas to ensure that our next rendezvous in Florence, marking our 50th anniversary year, is as fruitful and successful as possible for the European tape industry.

Furthermore, I would like to your draw attention to afera.com, of which 30% of its visitors come from outside Europe-significantly 15% from Asia and 12% from North America. Data such as this encourages us to think not only in terms of creating new partnerships but in creating simple new links for the exchange of information.

As for REACH, which at first glance might give rise to some degree of uncertainty, I believe that the inter-industry REACH project is in good hands and will be tackled with every resource available. With the contributions of all parties involved, our industry is gaining strength for the future, thanks to the implementation of this project. REACH will definitely be a topic covered at Conferences to come.

In addition to the classic regulatory topics such as the one above covered at Conferences, I would like to plan for future lecturers who can provide the industry with relevant (cross-cultural) managerial, organisational and market trends information, as was the case in Barcelona.

Finally, I would like to ask you for your assistance in two areas: First, in the promotion of Afera's logo-link as provided by L.A.M. for publication on your company websites. Why not link your organisation to the Association which constantly strives for the improvement of the tape industry? Second, in participation in and sponsorship of Afera's 51st Conference in Florence. As always, Afera will do its utmost to ensure its success, but this will be heightened by your input. Our next Conference should build on the success of the Barcelona event. This is a task worth getting involved in.

Thanks to you all,

Joaquim Puig

AFERA'S 50TH ANNUAL CONFERENCE IN BARCELONA

Presented by the 'Iberian Peninsula' Region of Afera's Membership, this year's Conference took place in the enchanting Mediterranean port city of Barcelona, bringing together the self adhesive tape industry's creative minds and decision-makers for an annual industry meeting.

OVERVIEW

Hosted at the Hotel Majestic from 3-6 October, this year's Conference boasted a record number of attendees: **164 delegates and 29 partners from 15 European countries and regions plus the U.S., Canada, U.A.E., Turkey, Israel and Japan!** The Annual Conference's 3-day working programme focussed on the collaboration of Afera's Members and various committees, and included **9 lectures** covering the latest trends in the tape industry. Together with an inspiring social programme, warm weather, 5-star accommodation and delicious Spanish cuisine, the 50th Annual Conference was, once again, deemed Afera's most professional and successful Conference to date.

FEEDBACK

The participant survey conducted at the conclusion of the Conference yielded **the most positive responses** for the topics **'adequate time for networking'** and **'overall evaluation of this Conference'**. Feedback also included a resounding **'YES'** to the question, **'Did this Conference meet your expectations?'** Although **all of the presentations received consistently favourable marks**, the highest-rated paper was **"Intercultural Management in Europe" by Michael Gates (Richard Lewis Communications, U.K.)**, closely followed by **"A New Global Tape Alliance" by Glen Anderson (Executive Vice President, PSTC, U.S.A.)**, and **"Pressure Sensitive Tape Production in Europe 2006" by Wolfgang Roessing (ExxonMobil, Germany).** *See reviews of these presentations below.*

Everyone agreed that the setting, the **Hotel Majestic**, located on the famous **Passeig de Gràcia** shopping street of Barcelona, was ideal. The **partner tour programme**, including a City Tour and visits to the **Barcelona Cathedral, Antoni Gaudí's Casa Milà** and the atmospheric **Spanish Village**, was a hit. **Flamenco dance-** and **paella cooking lessons** were also greatly enjoyed by the partners of attendees. Later on Thursday, following a delicious dinner at **Montjuic El Xalet** with beautiful panoramic views over the city of Barcelona, the dance students joined in the **Flamenco Show** which had been specially arranged as after-dinner entertainment.

THURSDAY'S PROGRAMME

Spanish Economy in the Globalisation Framework

After the opening of the Conference on 4th October by incoming **Afera President Joaquim Puig of tesa Spain, Mr. Miquel Valls Maseda, President of the Chamber of Commerce, Industry and Navigation (Spain)** delivered the first lecture, over-viewing the current situation of the Spanish economy in the context of the globalisation process and outlining the Chamber's view on the future challenges that the Spanish economy faces as a result of this process.

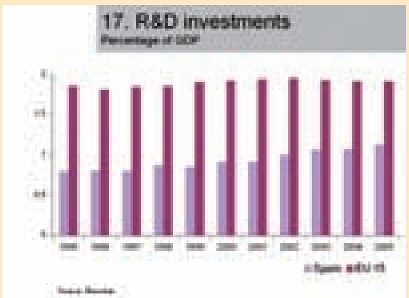
In the past few decades, the Spanish economy has been influenced by two major developments: its accession as a full member to the European Economic Community in 1986, and the growing globalisation process that we have all been experiencing over the last decade.

Spain's long-awaited accession to the EU played a decisive role in improving the situation of the Spanish economy by transforming it into one of the most dynamic economies among the developed countries. Freer circulation, which could have been a threat to the business sector, became a major opportunity. An increase in foreign trade has been accompanied by an increase in direct foreign investment. This growing internationalisation of both investment and trade in goods and services has been accompanied by a change in the structure of the Spanish economy, in which the services sector has progressively increased in weight to the detriment of the industrial sector.

Joining the Economic and Monetary Union also brought benefits to Spanish companies as a result of the structural reforms. Yet in spite of encouraging figures, productivity has grown at a rate far below the European average. Spain is now facing the effects of the globalisation process caused by the progressive removal of restrictions to the free trade of products and services and the free circulation of capital, the improvement of transportation infrastructures and technological progress. The globalisation process has enabled the creation of global products, providing access to new markets, but it has also meant the entry of new competitors.

In terms of labour prices, for example, there are now many developing countries that can offer labour costs that are far below those of Spain. Mr. Valls states that it is obvious that Spain's current economic model, which has been based on the intensive use of unskilled labour, must be refocused towards a model based on the intensive use of human capital capable of creating high value-added products and services.

The Barcelona Chamber of Commerce recommends improving the quality of the Spanish education system, intensifying investment in business innovation, creating infrastructures that are suitable for a highly globalised, human-capital-driven economy, and lastly, creating a climate that attracts quality direct foreign investment and minimising administrative costs.



Creating a Bigger Pie of the Tape Industry

Following a break, **"Creating a Bigger Pie of the Self Adhesive Tape Industry"** was second on the working programme agenda, a 'great', 'extremely inspirational' lecture presented by **Ir. Paul de Ruijter, of De Ruijter Strategy (NL)**. Mr. De Ruijter stated that growing competition from Asia means there is now a surplus of production in the European tape

industry. Commodity tape producers from Asia in particular, are competing with European markets, and this growing competition, combined with only a small increase in demand, has given rise to overcapacity in European markets. Prices are being put under pressure and, as a result, profit margins are decreasing. Price competition means that while one company makes a profit, the loss of another company is ensured. This would usually result in foreclosure and consolidation.

Is it possible to create a bigger pie for everyone, and can Afera help the European industry to reach this goal? One way to create a bigger pie is to expand the overall market. This is possible by reaching out to new geographic markets such as Eastern Europe, Russia or Asia. Expanding collaboratively is more likely to succeed than expanding individually.

Another possibility for market expansion is to increase the functionalities of tape so that it becomes interesting to new or existing market segments such as the automotive, electronics, communications or aircraft industries. In order to enter these new markets, it would be advantageous to co-operate with other tape producers within Afera. By creating a larger group and acting together, it is easier to convince other industry associates, from customers to experts, of the benefits and possible applications of tape. Thus 'developing new markets' increases the total size of the potential market, and in this way it is possible to create a 'bigger pie' for everyone.

By moving 'from volume to value', one can approach a commodity product such as packaging tape as a customised offering if additional services are taken into account. Good logistics, good payment conditions and a high delivery performance, mean you can differentiate from other producers by offering a better overall service. It is also possible to produce many small-sized lots, possibly with bigger margins, thus creating even more value. In order to achieve this, a well-organised supply chain and low transaction costs are needed.

Another way to add value to the total market than is currently the case is to put more emphasis on the specialty tape market. Additional functionalities will result in a product for which people are willing to pay a premium. Excellent service can also be seen as one of the ways to create value. Producers must research their customers to discover what other products or services they value.

Innovation is key to adding new functionalities and value. Through open innovation, active searching for new technologies and ideas outside the firm and by co-operating with competitors and suppliers, more customer value is created. Potential areas for open innovation also include sustainability and recycling, which are key issues currently facing the European tape market.

By shifting conventional thinking from 'value chains' to 'value constellations', a tape producer sees itself as one of the partners in the constellation (network) around the client. It is the co-operation in the network that helps the client to become more competitive, so the producer is not just 'adding value' to raw materials, it is co-producing value for its clients. By stimulating open innovation, new products can be made by a group of companies from different market segments, and as a result of that, new markets can be served.

By 'creating new markets', switching the emphasis from volume to value and by stimulating open innovation, the European tape industry is able to create a bigger pie within which growth for all companies is possible. Co-operation will make it easier to add new functionalities to tape through open innovation and to extend to new market segments and geographies, both geographically and in technical terms of the product.

Currently, Afera is not equipped to stimulate this co-operation. Because all Members need to agree before new projects can be launched, it is difficult to find subjects with enough common interest, and innovative projects tend not to find enough support to be carried out. Afera could act as a platform for all Members to meet, innovate and create different alliances together so that new products and technologies could be developed and new markets served.

Martec's European Tape Survey

The third lecture of the day was **"2006 PSA Tape Market in Europe – A State of the Industry"**, presented by **Mrs. Elke Fanni of the Martec Group (Germany)**. In 2007, Afera commissioned the Martec Group, a global technical market research and consulting firm for strategic, market-based research and consulting services, to conduct a low-cost, high-level analysis of the 2006 PSA tape industry of Western Europe. The final report of the Survey was delivered on 31 July. Martec conducted 50 interviews with active, associated and affiliated Members of Afera with the primary objective of generating the production size (volume and value) and growth (5-year forecast) by key tape segment, substrate and adhesive tape.

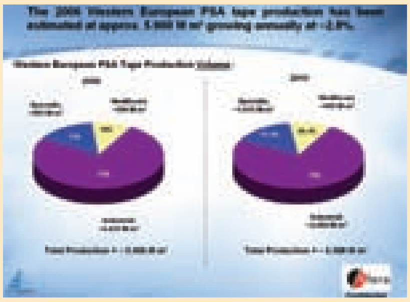
Martec's survey for Afera used the same segmentation as that of a PSTC study commissioned in 2005 in order to benchmark the figures for future years. The Martec Survey parameters and results were presented according to the following subjects: PSA tape segmentation, definitions of adhesives and substrates/backings, Western European PSA tape production in volume and value, Western European PSA industrial tape production volume, Western European PSA specialty tape production volume, Western European PSA healthcare tape production volume, Western European PSA tape production by substrate type, and Western European PSA tape production by adhesive type.

The primary conclusions: 2006 Western European PSA tape production was estimated at approximately 5,900 million m^2, growing annually at ~2.8%. The AAGR for industrial, specialty and healthcare tapes was estimated at 2.5%, 3.5% and 4% respectively. The 2006 PSA tape production value was estimated at €7.906 million. The 2010 PSA tape production value of ~€9.028 million was calculated with constant 2006 prices.

Healthcare tapes with ~€3.658 million accounted for the largest portion of the 2006 PSA tape production value. Industrial tapes dominated Western European tape production with a share of 75%. Packaging tapes accounted for 80% of the total PSA industrial tape production. Specialty tapes accounted for 15% of the total Western European PSA tape production volume. 'Other film tapes' accounted for 30% of the total PSA specialty tape production. Healthcare tapes appeared to be the smallest segment with only a 10% share of total PSA tape production. Sanitary tapes accounted for 50% of the total PSA healthcare tape production. Virtually all Members interviewed agreed on the largest substrate for PSA tape: film. Solvent-based adhesives were used the most for PSA tapes with an estimated share of 50%.

Martec's survey also revealed that virtually all Members agreed that Asia poses a threat with its cheaper products, while no Member mentioned a perceived threat from Eastern European tape producers. Members thought it remained unclear how REACH would really effect tape producers, but they concluded it would probably effect raw materials suppliers foremost. If the latter don't comply with the legislation, tape manufacturers might be forced to switch suppliers. Many Members indicated that e-commerce would become more important within the tape industry in the future.

In terms of compliance with European regulations, respondents indicated their feeling that the Western European PSA tape industry is the most regulated in the world. This means that their products are more environmentally friendly because they comply with stricter regulations, but they are more expensive, rendering them less competitive. Some respondents were willing to accept this situation to maintain the reputation of European quality. Lastly, when asked about their views of the repositioning of several players in the industry, Members indicated that they were not aware of any such developments. Some smaller manufacturers believed the dominance of some larger tape producers in the marketplace was excessive.



Chemical Raw Material Perspective

Next, **Thomas A. Brewer of Hydrocarbon Resin Service, DeWitt & Company (U.S.A.)** targeted important chemical raw materials supply and utilisation issues by addressing (1) global changes in the chemical industry over the next five years, (2) the impact on European chemicals for adhesives, and (3) the significant implications on purchasing strategies.

As Europe is currently short resin former feeds, demand is being supplied by imports of resin former feeds and resins. With resin costs in Europe higher than those of most of the regions of the world, what does this mean for the supply chain in the future? The changes in the chemical industry over the next five years are probably the most significant in the history of the industry. These changes will have a significant effect on resin formers used to produce polymers for the adhesive industry. Resin formers are typically carbon number five olefins used to produce low molecular weight tackifiers and styrenic block copolymers like SIS.

The most significant change is a major increase in advantaged ethylene capacity in the Middle East. This ethylene will be used to produce polyethylene. These increases in capacity are well beyond the local regional demand for polyethylene. It is therefore expected that this growth will be exported to other regions of the world. The polyethylene made in the Middle East has such a cost advantage that it can be produced, exported and sold in another region with a total cost less than that of polyethylene produced in that region.

Importing polyethylene to developed regions of the world can have the effect in the best case of maintaining current ethylene production with no growth in supply or in the worst case reducing ethylene production. As ethylene production is directly related to resin former production, this becomes a problem for resin formers and polymers made from these resin formers. Furthermore, it is expected that these imports from the Middle East would be brought into Europe and North America, where the majority of the resin former and downstream polymer units are located. Thus significantly effecting resin former supply.

Ethylene can be produced from gaseous feeds like ethane or liquid feeds like naphtha. When ethylene is produced from gaseous feeds there are little to no resin formers produced. Whereas, liquid feeds always produce resin formers. So it is also important to understand the feed trends on the production of ethylene.

Below are two major trends that will also effect resin former supply.

Motor gasoline reformulation in the U.S. has forced out lighter components, like butane. Butane is a gas that can be used to produce ethylene. In past, it was used as ethylene feed during the summer months, due to vapour pressure constraints on gasoline caused by the higher ambient temperatures. Now it is being used as ethylene feed for the majority of the year.

With the significant global expansion of ethylene over the next 5 years, a shortage of naphtha is expected. Naphtha is produced in refineries, and the refinery expansions aren't expected to catch-up with naphtha demand growth until 2010. This will drive ethylene producers to run more gas in their feed slate.

In summary, if all these factors on ethylene production come to fruition, there will be a significant reduction in resin former/polymer production in regions where there is established capacity (i.e. in North America, Europe, & Japan). The only potential offset: If Asia, excluding Japan, significantly increases its resin former/polymer capacity. With the ethylene expansions in that region, it is certainly a possibility. The only barriers to that happening are high capital costs and prices that are not sufficient to provide attractive investment economics. This situation is presenting some real challenges, but the creative company that figures out how to overcome these challenges will have a real advantage.

FRIDAY'S PROGRAMME

European Trends in Tape Manufacturing

The first presentation of the morning, described by respondents as 'clear' and 'encouraging', was delivered by veteran presenter **Wolfgang Roessing of Exxon-Mobil Chemical Europe, Inc. (Germany)**, covering **"Pressure Sensitive Tape Production Europe 2006"**.

In 2006, there was a global production increase of 5% to approximately 29 bm^2 of tape. The Asia Pacific region covering about 55% of total production was again the key growth driver with about a 7% production increase versus 2005, even though the increase was 2% lower than that of the previous two years. The Americas' production was still growing by 3.8%, despite the beginnings of an economic slowdown. This led to 6.7 bm^2 of tape produced in total, currently representing a global share of 25%. The remaining shares were 6.4 bm^2 produced in Europe, 3.3% more than in 2005.

Italy, with 3.9 bm^2 tape representing about 60% of total European production, grew by 2.7% versus 2005. Packaging tape at 4.7 bm^2 represented more than 70% of total European tape production. Masking tape as the second high volume application at more than 700 million m^2 and the other tapes with about 1 bm^2 total production volume grew by more than 4% compared to 2005.

The split in coating technologies used to produce PSA tapes clearly reflects the raw material supply-demand situation in Europe in 2006. Limited SIS availability at least in the first half of 2006 and feedstock supply constraints negatively impacting the premium tackifiers prevented HMPSA technology from growth in 2006 after a production decline of -6% in 2005. The output of water-based acrylic coated tape increased by 4.6% up to about 1.1 bm^2, mainly driven by specialty tape applications like double-sided and electrical tapes. Solvent technology, now at 2.9 bm^2, again shows the highest growth rate with 5.7% compared to the previous year.

As in 2005, the missing growth opportunities for HMPSA were captured by extended usage of natural rubber-based solvent technology, wherever possible. Hot melt coating technology declined by about 2% to slightly below 1.7 bm^2, while solvent grew by 7% to 2.1 bm^2.

After twenty years of ongoing substitution of PVC by BOPP by about 2% annually, the ration remains relatively stable (as for several years it went from 85% to 15%). The usage of both substrates grew in 2006; BOPP by almost 3% to slightly more than 3.9 bm^2 and PVC by almost 3.5% to close to 700 million m^2.

In 2006, masking tape production grew by more than 4% to more than 700 million m^2. After very moderate growth rates in 2004 and 2005 of about 1%, the 2006 growth rate is back in line with the historical annual average growth rate of the last 20 years. Technology-wise, the split remains unchanged at about 75% made by solvent- and 25% by hot-melt technology. For the first time since the beginning of the century, the solvent growth rate of 4.5% exceeded the hot-melt growth rate of only 2.5%, obviously also impacted by the supply constraints for hot-melt raw materials.

In 2006, the EU 27 became a 50 million m^2 net importer of paper tapes mainly from Asia Pacific and, to a minor extent, from the Americas. The trade surplus with the other regions counts for about the same amount. Middle East & Africa remains the key export region, despite a 60% volume decline since 2002.

From the view of the raw material supplier of the tape industry:

- Based on the forecast ongoing industrialisation process and the related impact specifically on the packaging industry, Mr. Roessing expects Asia Pacific to remain the key driver for global tape production growth.
- The tape-producing industry in Europe is growing once again.
- Positive economic forecast figures indicate a solid base for sustainable growth in the coming years.
- The intensified efforts of East European countries to bridge the gap in living standards compared to those of Western Europe will further drive growth in Europe.
- The balance of supply and demand for raw materials remains a challenge. This does not only apply to chemical products, but to products derived from natural resources.
- Contrary to the results of 2005 and 2006, we believe the tape producing industry will continue to move towards solvent-free technologies with hot melt technology as the primary candidate for substitution.

REACH

The second lecture of the day was the 'essential discussion' of **"REACH: Consequences for Tape Making"**, presented by returning lecturer **Paul Verspoor of Sitmae Consultancy (Netherlands)**. Under the complex, expensive, yet revolutionary, European Chemicals Policy, the burden of proof for demonstrating the safe use of existing chemicals has been transferred from the EU Member States to industry. For a full update on REACH, including the information covered in Mr. Verspoor's presentation, turn to "Regulatory Update" on pages 19-22.

VOCs & Other Air Quality Issues for Solvents

The status and future challenges of air quality regulations in Europe was the subject of **European Solvents Industry Group Secretary General Dorothee Arns' (B)** 'interesting' lecture. The ESIG's mission is to support the sustainable and responsible use of oxygenated and hydrocarbon solvents through dialogue, information sharing and solutions that address health, safety and environmental aspects. For a full update on European air quality regulatory issues as presented by Mrs. Arns, turn to "Regulatory Update" on pages 19-22.

A New Global Tape Alliance

Following a break, the **PSTC's proposal to create a 'Global Tape Alliance'** was discussed by **Executive Vice President of the PSTC Glen Anderson (U.S.A.)**. Having already received the Association's full support, the PSTC's concept of a global body which addresses the issues of the self adhesive tape industry that require worldwide co-operation, was outlined in detail and well-received by the audience.

Most member companies of the PSTC, Afera and JATMA admit that pursuing a global strategy is one of their top two company strategies, along with improving their test methods models.

The benefits of a global alliance are far-reaching: **more support and influence in terms of environmental and other regulatory issues, simplified processes for obtaining ISO certification of TMs, and the even exchange of valid market data**. The Alliance would formalise a global agreement, encourage global thinking, increase knowledge exchange and create a unified message from the world tape industry.

Current existing tape organisations throughout the world include Australia (ASC), Asia (China-CNAIA for adhesives in general), Japan (JATMA), South Korea (KSAIC), Taiwan (TRAATM), North America (PSTC) and Europe (Afera). For an alliance of these and any start-up regional organisations, no new costs would be borne by the participating associations. A formal managerial and member structure would be installed, including regulatory, technical (education and test standards (ISO) and marketing committees, and the hosting of the Annual Global Test Methods Committee Meeting would rotate among its members.

Mr. Anderson listed the next steps in the process of realising the Global Tape Alliance Organisation: (1) Bringing the concept to potential participatory associations' leadership (which in Afera's case has already approved the initiative), (2) Obtaining membership support, (3) Reporting these results (Autumn 2008) and finally, (4) Scheduling the first global meeting (to be held in conjunction with the host country's annual membership meeting).

The presentation concluded with a review of the PSTC's activities in 2007. Its 2-day spring member meeting in Washington, D.C. focussed on regulatory issues such as REACH and global warming/new ozone standards. The PSTC Week of Learning, which took place in Orlando, Florida in May, boasted 500 attendees and included two Tape University Classes, a workshop on 'Formulating Techniques', the Council's 30th Technical Conference and the 4th Global Test Methods Committee Meeting.

The PSTC has published its 15th edition of *Test Methods*, including a new Electrical Method, the 4 harmonised methods and updated appendices. The PSTC is also working to build a marketing structure in 2007, along with establishing a new Industrial Intelligence Subcommittee (overseeing the Martec studies – a new Import and Export Study and an Update of the 2005 North American Volume Study).

Lastly, Mr. Anderson reviewed North American 2005 production statistics for PSA tapes, including general tape production in millions of m^2 and in U.S. dollars; and industrial, specialty, healthcare and retails tapes, along with tape backing figures. The North American tape adhesives market trends and drivers include (1) increased environmental regulations (pushed by local government entities; a shift to water-based and hot-melt technologies; green image); (2) processing gains as a driver in technology adoption in cost sensitive industries (reductions in adhesive use, waste generation/recyclable, floor space reduction and labour reduction); and (3) higher growth expected from water-based and alternative technologies like UV/EB and 100% solid systems.

Business Innovation

The last lecture of the Conference was the most popular, covering **"Intercultural Management in Europe"** and was delivered by Michael J. Gates **of Richard Lewis Communications (U.K.)**. Mr. Gates explained in an interesting set of slides that cultural interaction is a business process that must be managed – that it cannot be left to chance.

In order to compete globally, the European adhesive tape industry needs increasingly to collaborate. Global collaboration is also necessary to promote a legislative environment which will benefit the industry as a whole. And, of course, collaboration across borders will be increasingly important within individual companies – as well as understanding the needs of customers and end-users in different countries and regions.

But collaboration requires us to understand people with different ways of thinking, behaving and communicating. Not only to understand them, but to do something about it. The challenge is that there are so many different cultures in the world – more than 200 national cultures. Is there a systematic way of approaching this?

Michael Gates introduced the audience to a model of culture devised by Richard D. Lewis, author of *When Cultures Collide: Leading Across Cultures*. The Lewis Model has been steadily gaining acceptance among corporations and universities in the 1990s as the clearest and most effective model for cultural analysis that currently exists. The Lewis Model of culture divides cultures into:

- Linear-active: Cool, decisive planners. Task-oriented. Complete action chains.
- Multi-active: Emotional and impulsive. Creative. Relationship-orientated. People-time rather than clock-time.
- Reactive: Patient, harmonising and introverted. Use silence and rarely initiate. Courteous and respectful.

This is a useful starting point for analysing global cultural types, then beginning to adapt our behaviour when trying to make ourselves understood, and ultimately profiting from diversity. Mr. Gates looked at what culture is, what its origins are and how we acquire it – probably more or less by the age of 7. This is why we assume our way is normal, and people who are different have got it wrong!

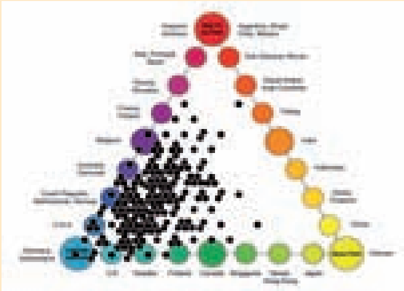
We need to look at our own values, beliefs and personal style as if from the outside. This is even more important than learning lots of detailed facts about other cultures. Once we have understood more clearly the essence of our own culture and that of the other culture – our different cultural horizons – we need to try and focus on common ground, as well as plan how we will manage the differences.

It helps systematically to apply the model to different areas of importance in business such as communication patterns, listening habits, presentations, audience expectations, meetings and negotiations, leadership, motivation, the language of management, time and space, teams… the list is endless. You then need to work out how you are going to adapt.

Perhaps we could accentuate the personal, emotional appeal if we want to get through to Russians. For our presentation in Sweden, maybe we should add more facts and figures and think of involving people in the decision-making process. In the U.S.A., we need to focus on the future and keep it simple. In Germany, on the historical background, and on the complexity of the situation and all possible eventualities.

In the end, all human systems are built on trust, but different cultures build trust in different ways. Understanding this and using cultural sensitivity as a part of our business planning and strategy can give us a real competitive edge in a time when the margins for competitive edge are becoming smaller. Know yourself, try to understand other cultures, and then do something about it!

In addition to cross-cultural training, Richard Lewis Communications also conducts high-level language and communications skills training for business. For more information, contact Daniela Derbyshire via daniela.derbyshire@rlcglobal.com.



SPONSORS

Afera's 50th Annual Conference once again provided a platform from which Members could conduct business-to-business marketing by sponsoring the event. Afera had the privilege of organising the event with the support of the following sponsors:
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SLIDES, NOTES & ADDITIONAL INFO

The proceedings of the Conference programme were distributed to the participants, and the corresponding slide presentations can be found on afera.com (Members-only section). A detailed 50th Annual Conference programme, as well as this article, can also be found at afera.com.

NEXT YEAR'S ANNUAL CONFERENCE

Hosted by Afera's 'Italy' Region of Membership, **Afera's 51st Annual Conference** is set to take place at the **Grand Hotel Baglioni in Florence, Italy** from **1st-4th October**, 2008. Special Conference highlights are planned to mark the 50th Anniversary Year of the Association (see "Afera's 50th Anniversary Year", page 12).

GENERAL ASSEMBLY REPORT 2007

The annual General Assembly was the first item on the agenda of the first official day, **4th October,** of the 50th Annual Conference in Barcelona. **Attended by approximately 70% of Afera's membership**, this year's GA was called to order by outgoing Afera President Mike Ayres, who then conducted the first vote resulting in the **approval of the GA 2006 Minutes recorded at the Annual Conference in Nice**. The **current and future activities of the Committees** were then presented by the Chairmen in turn, as laid out in the "Activities of the Committees" on pages 10-11 of this issue.

After a review of the financial balance sheet of 2006 and the latest estimate for 2007, the GA **voted to approve the budget for 2008**, as well as **to keep membership fees the same for the 7th consecutive year**. The President then called attention to the Steering Committee, citing the Association's membership statute which details the rotation schedule for Afera's Presidency (see schedule in "Activities of the Committees", SC section). Accordingly, **Joaquim Puig, SC 'Iberian Peninsula' Regional Representative**, assumed his position as **President for the term of 2007-2009**. Likewise, **Filippo Antonelli, SC 'Italy' Regional Representative**, assumed his position as **Vice President**. **Renata Klamka** joined the SC as **'Eastern Europe' Regional Representative**, replacing **Emilio Angeli**, who retired from two decades of exemplary service to Afera.

The composition of the SC was otherwise unchanged, with all Representatives intending **to serve out their terms through September 2009** (with the exception of Mike Ayres, who is currently seeking a replacement). According to Afera's management rotation schedule, the **SC 'Italy' Regional Representative** will assume the **Presidency for the term of 2009-2011**. Mr. Puig thanked Mr. Ayres for the last two years he dedicated to the effective Presidency of Afera. Drawing attention to **Afera's 50th anniversary in 2008**, President Puig announced that in addition to a **limited 50th Anniversary Publication** which is set for issue in 2008, a special celebration is planned at the 51st Annual Conference, to be held from 1st-4th October 2008 at the Grand Hotel Baglioni in Florence, Italy.

ACTIVITIES OF THE COMMITTEES

Afera Committee Meetings
When: *2nd October (TC) & 3rd October (SC & MC) 2007*
Where: *Hotel Majestic, Barcelona, Spain, at the event of the 50th Annual Conference*
Purpose: *As the lifelines of the Association, Afera's Committees meet at least twice yearly to discuss and develop their action plans for carrying out Afera's mission: To represent the interests of the self adhesive tape industry in the broadest sense.*

At the start of each meeting, Afera's policy for member compliance with competition law is reviewed, and the minutes of the respective former meetings are approved.

STEERING COMMITTEE UPDATE

Positions

From	Representative	Until
Eastern Europe	Renata Klamka	9/2009
Central Europe	Peter Rambusch	9/2009
Western Europe	Laurent Derolez	9/2009
Iberian Peninsula	Joaquim Puig	9/2009
Italy	Filippo Antonelli	9/2009
Northern Europe	Mike Ayres (pending replacement)	9/2009
Chair MKC	Eric Pass	9/2009
Chair TC	Lutz Jacob	9/2009

- Rotation Schedule:

Presidency	Years	Vice Presidency
Iberian Peninsula	2007-2009	(Joaquim Puig) Italy
Italy	2009-2011	Central Europe
Central Europe	2011-2013	Western Europe
Western Europe	2013-2015	Eastern Europe
Eastern Europe	2015-2017	Northern Europe
Northern Europe	2017-2019	Italy

- Veteran SC member, former two-term Afera President **Emilio Angeli** (outgoing SC 'Eastern Europe' Regional Representative) was present at his last SC meeting, as his term ended at the GA 2007. The SC thanked Mr. Angeli for his two decades of positive and productive service to Afera, during which he was instrumental in facilitating the move of Afera's Secretariat from Paris to The Hague and in its further strategic development, especially over the last five years. For an inside view on Mr. Angeli's long career in the tape industry, see "Captains of Industry Speak: Part II of a Special 50th Anniversary Series", page 15. Mr. Angeli is succeeded by **Renata Klamka, General Manager of tesa Poland**.
- As laid out in President Ayres' 14 May 2007 letter to the Membership, the SC agreed on **a new procedure for appointing SC members.** Mr. Ayres noted the disappointingly low response with interest from the Membership, as the SC will need 'new blood' in the future. The new board was confirmed at the General Assembly held in Barcelona on 4 October 2007 (see "General Assembly Report 2007", page 10).
- **SNCP**, the French Rubber Manufacturer's Association, an affiliated Afera member, has agreed to extend its representation to include all of Western Europe, including the Iberian Peninsula. (In 2009, Afera's 'Iberian Peninsula' membership region will be incorporated into 'Western Europe' due to the small number of tape producing companies in that region.)
- **Afera TC member Hubertus con Voithenberg of tesa is FEICA's guest member at its ETB meetings; Dr. Axel Heßland of FEICA** participates at Afera TC meetings as the Association's guest member.

New Members since November 2007
- **Affiliated Member PTS Munich, Germany**

Finances
- Continued **financial success in 2007** was highlighted; 2008 budget was reviewed.
- The remainder of 2007's surplus, due to revenue generated through Afera's successful events, will be put toward next year's Annual Conference once again.
- In the future, member discounts on participants fees for Afera events will only be valid if actual payment is received by 'early bird' deadlines.
- **2008 membership fees will remain unchanged for the 7th consecutive year.**

Formation of a 'World Tape Council'
- See "Afera Strategies Update", page 12.

Co-operation with other Industries re: Implementing REACH
- See "Regulatory Update", pages 19-22.

Next SC Meeting
- **Thursday, 7 February 2008, 13h-17h30, Jolly Carlton Hotel, Amsterdam**

MARKETING COMMITTEE UPDATE

MKC Members
- **MKC Chairman Eric Pass of Nitto Europe** welcomed **incoming MKC members Mikko Meyder (Evonik Industries, formerly Degussa), Peter Nissing (Lohmann), Sergio Colonelli (Scapa) and Helge Schönfeld (Sika).**

Afera European Tape Studies
- See "European Tape Survey", page 12.

Brand Recognition
- **Afera's logo-link and by-line "Member of Afera"** is now available for publication on member websites. Members are strongly encouraged to take advantage of this marketing opportunity.

Afera News
- Beginning with the June 2007 issue of *Afera News*, a special series covering **interviews with captains of the self adhesive tape industry** was published. Turn to pgs. 15-18 to learn more about the experiences and outlook of **tape guru Emilio Angeli** and **Nar's founder and CEO Antonio Righetti.**
- The biannual publication is now available in **pdf-format** and is distributed to an extended email list.

Annual Conferences 2007, 2008
- The **2007 Annual Conference** had the **highest attendance rate to date with 164 delegates** and **29 partners**. The event received rave reviews from participants. **Michael Gates of Richard Lewis Communications (U.K.)** received **the highest-ratings for his presentation on "Intercultural Management in Europe"**. See "Afera's 50th Annual Conference in Barcelona", pages 4-9, for a full review of the event.
- Hosted by Afera's 'Italy' Region of membership, the **2008 Annual Conference** will be held from **1-4 October 2008** at the Grand Hotel Baglioni in **Florence**. Special Conference highlights are planned to mark the 50th Anniversary of the Association (see "Afera's 50th Anniversary Year", page 12).
- **2008's Conference Programme Committee (CPC): Mikko Meyder (Chairman CPC, Member MKC, Evonik), Helge Schönfeld (Member MKC, Sika), Jörn Meuwissen (Member MKC, Avery Dennison), Peter Nissing (Member MKC, Lohmann), Lutz Jacob (Chairman TC), Filippo Antonelli (SC Member, Host Annual Conf. 2008).**
- Next Year's Conference is already set to include a welcome cocktail party at the hotel, an afternoon and evening spent in Siena (at the Cortile del Podestà for a cocktail and the Museum of the Contrada della Civetta for an informal dinner), and Friday evening's gala dinner at the Villa Castelletti. The CPC will meet over the next few months to develop a superior working programme, as well as an interesting programme for partners.

Website
- **Afera's overhauled website went online on 1 January 2007.**
- The S-G's web statistics for January-October 2007 indicate that after Europe, the **largest numbers of visitors** were from **Asia** and **North America**. The countries with the largest totals of visitors were Germany, the U.S., the U.K., France, Poland, the Netherlands, Italy and Russia.

Membership
- Afera currently numbers **56 Active Members, 50 Associated Members, 6 Affiliated Members, 3 Honorary Members and 9 Other Participants, totalling 124.**
- The MKC and SC, in conjunction with 4 large converters, are in the initial stages of discussing the **launching of a converter organisation under the Afera umbrella**. In this way, Afera could

better represent converters by expanding the organised platform of industry converters and providing it with focussed Association services – in this way better incorporating all entities in the tape industry value chain.

Next MC Meeting

- **Wednesday, 6 February 2008, 13h-17h30, Jolly Carlton Hotel, Amsterdam**

TECHNICAL COMMITTEE UPDATE

New TC Members & Special Guests

- **TC Chairman Lutz Jacob** welcomed incoming TC members **Andreas Hohmann (Certoplast), Andy Woodward (Scapa)**, counterpart guests **Glen Anderson (PSTC)** and **Akira Katakura (JATMA)**, and guest **Jörg Soding (Laufenberg)**.
- Chairman Jacob expressed his hope to welcome **Isabelle Uhl (Rohm & Haas France)**, who is recovering from treatment of a major illness, at the next TC meeting. The TC also sent its best wishes to **Peter Broschk**, who was absent due to the onset of a sudden health condition.

Test Methods - Global Harmonisation

ISO

- The **fast track ISO certification process of the three globally harmonised test methods (EN1939-Peel Adhesion, EN1943-Shear Adhesion, and EN14410-Breaking Strength and Elongation)** concluded with the **ratification of the norms in July 2007.**
- **Publication** of the ISO norms is set for **November 2007**.
- These achievements are due to the dedicated work of members of the PSTC, JATMA, AFNOR and Afera. **Within Afera, special thanks went to Peter Lloyd, Chairman of CEN/TC 253.**

- The test method **EN1942-Thickness** has been integrated into the ISO certification process. It is 'out for comments' until 20 November 2007, after which it may take another 2 or 3 months for the CEN method to be ratified. The ISO have informed Afera that the fast track certification procedure may not be utilised for future TM harmonisation.
- No new methods will be developed for ISO certification; harmonisation will be sought for existing methods only. The PSTC have presented the following TMs to Afera and JATMA for review and discussion towards agreement: **Tack Testing, Release Performance, Unwind, Tear Resistance, Accelerated Aging of PSA Tapes**. Each counterpart needs to have delegates serving on the ISO subcommittees (under TC 61) hosting all PSA tape standards. 2 Afera TC members, **Mr. Jacob** and **Mike Konieczko**, will attend the **PSTC's February 2008 meeting to collaborate on planning new global harmonisation processes**.

Annual Global Test Methods Committee Meeting

- Hosted by the PSTC, the **4th Annual Global TMs Comm. Mtg.** took place at the American association's annual conference in Orlando, Florida in May 2007.
- The 5 TMs listed above were discussed.
- As the **PSTC-6 Tack Rolling Ball TM** does not produce accurate results, JATMA will develop a more properly-functioning TM by combining the PSTC method with its own JIS Method. Afera will work with both the PSTC and JATMA TM committees to fine-tune the TM and finalise it through Round Robin Testing.

Width & Length of Tape TM

- **PSTC TM 171-Width & Length of Tape** is on the prioritised list of TMs for ISO certification.
- A **TC subcommittee** (incl. **Peter Broschk of tesa, Herman Delsiene of Nitto Europe, Mr. Jacob and Mike Konieczko of Advanced Tapes**) was formed to ensure the clarity and uniformity of specifications of types and tolerances of tapes used.
- The TC Subcommittee proposed to the TC that Afera's TM be based on the pre-existing PSTC 171 TM by adjusting it to modular metric only and adding specifically-outlined details for measurement. (The TC and MC decided that the tape length on the core would not be mentioned, focussing solely on the measurement procedure itself. Thus '**Usable Length**' should be the term of measure for tape length.) Mr. Jacob has sent the modified slide proposal once again to the PSTC for consideration.

Afera Test Methods Manual

- Following the ratification of the 3 harmonised TMs, a **new edition of the TM Manual** is currently under review by TC members for **publication in the first quarter of 2008**.
  The certified TMs will appear in Afera's usual layout with proper ISO references.
- In conjunction with the TM Manual's re-issuance, each method will be published in the members-only section of afera.com.
- Every Afera Member will receive one copy; additional copies will be available for purchase.
- A purchase form will be accessible to third parties on the public section of afera.com.

Environment – IPPC and Other Issues

- The TC is seeking **volunteers** to participate in carrying out important work for Afera in the form of **monitoring environmental and other developments in public affairs which effect the tape industry**. Environmental legislation effecting tape producers must be reviewed, prioritised and summarised in Afera TC meetings. In addition, **a co-ordinator is needed** to oversee these public affairs monitors, preferably someone who is already commissioned by their own company to follow these regulatory issues. The co-ordinator will be responsible for reviewing environmental news provided by FEICA, Assogomma, IVK, Cefic, FINAT, SNCP, etc.
- A **subgroup of 3-4 delegates** will be formed to **draft a priority listing of regulatory issues to be monitored**. With the exception of the co-ordinator, these delegates do not necessarily have to be members of the TC.

Co-operation with FEICA

- FEICA's latest **FEICA European Technical Board (ETB)** meeting took place in September 2007 and was attended by **Afera TC member Hubertus von Voithenberg of tesa**.
- **B. Burchard** has been elected to **head the ETB**.
- FEICA is following and sharing information with Afera related to REACH, Adhesives in Food-Related Applications, 'Green Adhesives', DIBP and Indoor Air.
- **Dr. Axel Heßland of FEICA**, who participates at Afera TC meetings, pointed out that Afera's representation of the tape industry is a borderline case between 2nd downstream users and 1st downstream users (formulators). Afera should also collaborate closely with 1st downstream users (**DUCC – Downstream Users of Chemicals Co-ordination**) to strengthen the platform towards the European Commission. Dr. Heßland and **Afera's lobbying consultant, Paul Verspoor**, will meet to discuss this issue.
- Afera and FEICA participate in **RIP 3.2.2**: See 'Regulatory Update' on pages 19-22.

3rd Tape College

- Afera hosted **a very successful 3rd Tape College from 18-20 April 2007** at the Renaissance Hotel Brussels. The event included 14 highly-rated lectures attended by 110 industry participants.

4th Technical Seminar

- Afera will host this event from **9-11 April 2008** at the Brussels Marriott Hotel in the city centre.
- **Early bird registration deadline for registration + payment: 15th February 2008**. Participation fee will increase by €100 after this date.

Environment - REACH

- For an update on REACH developments effecting the tape industry, turn to "Regulatory Update" on pages 19-22.

Next TC Meeting

- **Wednesday, 6 February 2008, 9h-12h30, Jolly Carlton Hotel, Amsterdam**

AFERA'S 50TH ANNIVERSARY YEAR

The **50th Anniversary MKC Subgroup (Eric Pass of Nitto Europe, Frederic Bodino of Rohm & Haas, Oliver Nickel of Fiber-Mark, Sergio Colonelli of Scapa, Arrigo Righetti of NAR and the S-G)** is gearing up to celebrate Afera's 50th Anniversary in 2008.

This will be marked firstly by **the launch of Afera's 50th Anniversary Publication**, a special edition featuring high-quality graphics and information on the diverse uses of tapes and Afera´s role in the industry – past, present and future. Exclusive interviews with 'captains of the self adhesive tape industry' – veteran leaders of larger tape producing companies such as tesa's Dieter Steinmeyer and Emilio Angeli, Sicad's Ivano Zucchiatti and NAR's Antonio Righetti – will also be included. All Association Members will receive one complimentary copy at next year's Annual Conference. (Additional copies are already available for order at special Member rates.)

Also in store for Afera's Membership are distinctive **celebratory touches at Afera's 51st Annual Conference to be held 1st-4th October 2008 in Florence**. Look for the programme to include special speakers on Afera's milestones and future opportunities, the world of tape and perhaps even the lighter side of living with adhesives. The event will also carry its own 50th anniversary unique branding (artistic) embellishments.

Keep an eye out for **Afera's 50th Anniversary Year Gold Sponsors' banners at afera.com from 1st May 2008**. Both the Anniversary publication and the 51st Conference are available for sponsorship by Afera Members. Contact Afera's Secretariat on +31 70 312 39 16 or via mail@afera.com to learn about the costs and numerous benefits.

AFERA STRATEGIES UPDATE

The Steering Committee are moving forward with (1) **the geographical expansion of Afera's boundaries**, and (2) **collaboration with counterparts (both existing and newly-launched organisations)**.

Over the last few years, the Association has attracted interest in membership from companies located outside of Afera's current European boundaries, such as the Middle East and India. Expanding Afera's borders would ultimately entail changing the identity of Afera from "The European Association for the Self Adhesive Tape Industry" to "The Association for the Self Adhesive Tape Industry in Europe, (and for example) the Middle East and Africa (EMEA)."

Afera's Committees have already discussed the added-value of expanding the Association's borders to accommodate one or more regions, thus incorporating more members, and therefore input and resources, into the bounds of the Association. One of the first steps taken was the gauging of interest of the market players in these regions. Afera has only seen a handful of outside attendees at its events because of the enormous expense of travel and accommodations costs.

The **SC Subgroup responsible for Afera's new strategies, including Mike Ayres, Laurent Derolez and S-G Astrid Lejeune**, is considering going to regions which lack national or local organisations, such as China, and educating them on issues which are of common interest to the tape industry. These **events would be organised under the Afera umbrella with the help of Afera multinational Members who have subsidiaries in these areas**, such as **3M, tesa, Lohmann, Certoplast, Novacel, etc**. This could lead to a **separate start-up organisation** such as 'Afera China'. For now, a teleconference of the Subgroup is planned with a tape industry contact in Dubai, and an actual expansion of Afera's borders would begin with the Middle East (including India) and Africa.

In 'dealing globally with public and private bodies of interest to its Members with regard to technical, ecological, commercial, economic and social developments within the tape industry,' Afera has decided to lend its full support to the creation of a '**Global Tape Alliance**'. The PSTC has developed a concept of a global body which addresses the issues of the self adhesive tape industry that require worldwide co-operation. This was presented by **Exec. VP of the PSTC Glen Anderson** in his lecture **"A New Global Tape Alliance"** at Afera's Conference in Barcelona last month.

The benefits are far-reaching: **more support and influence in terms of environmental and other regulatory issues, simplified processes for obtaining ISO certification of TMs, and the even exchange of valid market data**. The Alliance would formalise a global agreement, encourage global thinking, increase knowledge exchange and create a unified message from the world tape industry.

Current existing tape organisations throughout the world include Australia (ASC), Asia (China-CNAIA for adhesives in general), Japan (JATMA), South Korea (KSAIC), Taiwan (TRAATM), North America (PSTC) and Europe (Afera). As mentioned above, important regions which are not represented would be the focus of an Afera start-up. For Afera's European Membership, this would mean gaining and imparting a better understanding of the complexities of conducting business in both Europe and China, further progress toward global standardisation and wider access to market research.

EUROPEAN TAPE SURVEY

Afera has moved forward with a new **European tape survey** performed by the **Martec Group**, a global technical market research and consulting firm for strategic, market-based research and consulting services. Martec conducted a low-cost, high-level analysis of the 2005 PSA tape industry of North America for the PSTC. Mrs. E. Fanni of the Martec Group presented the scope and findings of Martec's initial study in her presentation entitled **"2006 PSA Tape Market in Europe – A State of the Industry"** at the Annual Conference in Barcelona last month. Afera used the **same segmentation as that of the PSTC** study in order to benchmark the figures for future years. **JATMA** may soon participate in the same Survey, following the same procedures, to add an additional benchmark opportunity to present a comprehensive view of the counterparts' markets.

The Martec Survey parameters and results were presented according to the following subjects: PSA tape segmentation, definitions of adhesives and substrates/backings, Western European PSA tape production in volume and value, Western European PSA industrial tape production volume, Western European PSA specialty tape production volume, Western European PSA healthcare tape production volume, Western European PSA tape production by substrate type, and Western European PSA tape production by adhesive type.

Acknowledging that it is difficult to gather reliable figures and to agree on segmentation among Afera's Members, **the MKC are satisfied with Martec's Survey mechanism** which is now in place. It can be fine-tuned in co-operation with the PSTC and further expanded in the future if and when an updated model is developed for all the members. Even if a company subscribes to a different form of segmentation, they are at least able to 'read' the Survey's figures and benchmark them with the counterpart survey results.

Going forward, the MKC has recommended to the SC that the Survey is conducted by Martec on a **yearly basis with a limited budget**. Discussions are also underway on conducting another **in-depth study of 'Import/Export in Europe'** through Martec to mirror the 'Import/Export in North America' study the PSTC has currently commissioned Martec to undertake.

NEWS OF THE INDUSTRY

BI.ESSE ADESIVI S.P.A.- ITALY

Bi.esse, who has always focussed its efforts on the development of its commercial network and on acquisition of highly technological and most advanced manufacturing equipment, has confirmed once more how much it values this aspect of the Company's policy with the recently created new positions of Area Sales Manager in its organization, with the establishment of new subsidiaries abroad and with the quite recent installation of new highly advanced manufacturing equipment.

Bi.esse, for ever been present on the flexographic market with highly technical and performing products, has now developed a new range of products with highly advanced features, that fully meet the most demanding requirements of its customers.

EVONIK GOLDSCHMIDT GMBH - GERMANY – NAME CHANGE DEGUSSA GOLDSCHMIDT

Since September 12, 2007 Degussa has been the Chemicals Business Area of the new Evonik Industries AG.
Evonik Industries is the creative industrial group which operates in three highly profitable business areas: Chemicals (formerly Degussa), Energy and Real Estate.
Evonik Goldschmidt GmbH positions itself as the market leader for surface active ingredients and performance additives.
Even though our name has changed, Evonik Goldschmidt GmbH was and will remain your creative and reliable partner for silicone release agents in the self-adhesive tape industry.

MIKKO MEYDER SUCCESSOR TO HELMUT BRUS

As known, former Degussa delegate Helmut Brus has left the AFERA Marketing Committee in February this year in view of his early retirement by November 2007. Evonik (formerly Degussa) is now proud to announce that Mikko Meyder, successor to Helmut Brus, in his function as Global Marketing Manager RC Silicones has re-occupied the vacant seat in the AFERA Marketing Committee. Evonik sees its engangement in AFERA as a commitment
to contribute to the further successful development of the association. Besides Mikko Meyder, Jürgen Pomorin is an active committee member of AFERA working in the Technical Commmittee.

F.LLI MARIS S.P.A. - ITALY
NEW MARIS TECHNOLOGICAL CENTER

Maris Company announces the opening of a new Technological Center, aimed to improve even more the technical support to its Customers.
Located in a new building of eleven thousands square meters, this center includes four compounding extrusion lines and a lab for analyses.
As far as the adhesive sector is concerned, the technological center allows the possibility to run trials for the continuous production of hot-melt and solvent based adhesives.

ICHEMCO S.P.A. - ITALY

The announced new plant for the production of powder release agents (Release K100 Series) has been put on stream during past August/September and will reach full efficiency (with the addition of a new larger reactor) before year end.

New products, processes, development work:

- Our range of specialty hot-melt p.s.a.'s continuously broadens with the introduction of new grades :
  TACKMELT R002: low peel adhesion, for removable labels.
  TACKMELT A 46M: very high tack and adhesion with good cohesion.
  TACKMELT A48M2: good tack, high cohesion and good thermal resistance.
  TACKMELT A49: very high adhesion with good cohesion.
- New low noise release agent: RELEASE PP 25LN, for easy and silent unwinding.
- New aromatic free solvent release agent: RELEASE PP 25 ECO PRINT for printing BOPP adhesive tapes with less environmental risks.
- Our RELEASE W40G2 (extremely competitive Release Agent for general purpose Masking tapes) confirms the tendency to become a real best seller on the markets.
- Our new RVision no contact thickness measuring system for production/pilot coating lines produces the best accuracy results if compared to traditional systems (using radioactive sources).

Further Information Contact
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LOHMANN GMBH & CO - GERMANY

With Duplocoll 56000 LSE (low surface energy) the Lohmann Adhesive Tapes Group has developed a new product with the special features. The high performance adhesion of this tape shows outstanding peel and shear strengths on nearly every substrate, withstands enormous forces and has an extensive resistance to heat. The thin, conformable foam carrier does not only compensate for uneven, but even structured surfaces.
This new 'mounting power tape' is specially suitable to adhere nonpolar surfaces like polyethylene or polypropylene. Therefore special applications are in the electronic or building industry as well as in the bonding of low surface plastics in the automotive industry.

MIARCO S.L. - SPAIN
MIARCO MOVES TO HIS NEWS HEADQUARTERS

Miarco moves his general headquarters to the Technologic Park of Valencia. After being more than 38 years in the older Cuenca St. offices of Valencia, Miarco moves last summer to its new very high tech building, located in one of the most advanced managerial centers of eastern Spain.

The constant growth of the company, with almost four decades of experience in the sector of special tapes, adhesives and industrial supplies, gave place that in the last times the former facilities of offices of Cuenca St. of Valencia - where from it's foundation Miarco had been placed- had remained small.

Because of it, the managers of the Valencian signature started shuffling the possibilities of moving to a new bigger place. Firstable the thought was to build new offices near the plant and the store of the company (located very close to Valencia's airport). Nevertheless, finally, there arose the opportunity to buy a not concluded whole office block, so that Miarco still would might adapt any constructive elements and especially from distribution to its needs.

The new building consists of three floors, basements and almost 60 parking lots.
The external structure is dominated by concrete and big windows, which makes possible that the offices has a lot of natural light.
The modern conception includes the last innovations, which facilitates very much the use of the new technologies and of the home automation in the same one.

With this movement, Miarco opens a new stage in its history. A period in which the growth, consolidation and modernization of the company will continue being the priority aims of its managerial activity.

NITTO EUROPE N.V. - BELGIUM
NEW PRESIDENT NITTO EUROPE NV

Mr. Takasaki, Nitto Europe's President, has accepted a new challenge within the Nitto Denko organization. He has recently taken up the position of corporate vice president at our Japanese mother company Nitto Denko Corporation, with the operational responsibility for the Optical Division.

As of the 10^{th} of July 2007, Mr. Yasushi Nakahira has been appointed as the new president of Nitto Europe NV. Mr. Nakahira has 27 years of experience with Nitto Denko in a wide range of responsibilities.

NEW PLANT
Nitto Denko to Produce Optical Films for LCD-TVs in Czech Republic

To Strengthen Local Supply Setup based on a State-of-the-Art Plant
Nitto Denko Corporation has established a local production subsidiary in Brno, the Czech Republic, in order to meet the increasing

demand for optical films for liquid crystal display (LCD)-TVs in the European region.

LCD-TV makers are increasingly locating their production sites in China, Europe and North America, in order to meet the globally soaring demand for large-screen LCD-TVs. Particularly in Europe, TV manufacturers are concentrating their production sites in the central European areas such as Czech Republic and Poland.

The new plant will have such a setup that it would be capable of adequately running the finishing process of optical films for large-screen LCD-TVs which are expected to face a rapid expansion of demand. At the same time, the plant will be equipped with the latest processing and inspection technologies to change the hitherto labor-intensive finishing stage into capital-intensive automated processing, in order to keep the plant headcount to a minimum and realize a significant productivity improvement.

NOVACEL – FRANCE
NOVACEL HAS COMMISSIONED A NEW COATING LINE

In order to supply its growing volumes of surface protection film, the world leader NOVACEL has commissioned a brand new state-of-the-art, wide width, high speed coating line.
Located in Déville-lès-Rouen, France, this machine is also able to print.
Along with this production, the growth of Novacel protective films will be driven by outstanding technical service and logistical support.

With more than 40 years of dedicated experience, NOVACEL is proud to enlarge its machinery and thus to serve the growing automotive and electronics markets with upgraded quality and cost competitiveness. “We are excited about the opportunity this new production capacity will give us to expand our presence in the world”, said Laurent Derolez, Managing Director.

NOVAMELT GMBH - GERMANY

Novamelt GmbH will once again further increase their production capacity to fulfil the strong demand from its existing and new customers. A substantial investment has been made in a new state of the art manufacturing line for pressure sensitive hot melt based on thermoplastic rubber; the new line will be fully operational by the end of October.

With their latest new product development PS 5040, Novamelt has further extended its product range with another hotmelt adhesive with greatly improved thermal resistance values. The shear temperature (SAFT) is at ca. 100ºC. This has been achieved without compromising the higher processing viscosity, limits in the melting performance and application speed.

Due to higher demands from end users, for example in the automotive industry, the demand in UV-curable PSA hot melt is growing faster than ever before. To improve handling from a customer prospective, Novamelt is now offering a new innovative delivery form: 1 to containers for multi use with an integrated heating system.

PLANATOL KLEBTECHNIK GMBH – GERMANY

PLANATOL – the specialist for glues – under new leadership
Theodor Hesselmann moves to advisory board, Michael Böddeker sole managing director

The medium-sized company PLANATOL from Bavaria, a specialist for gluing technology, is about to have a change in its top management. After 51 years as a member of the company, the managing director Theodor Hesselmann will move to the advisory board on January 1st, 2008. Michael Böddeker, who has shared the family company’s management with Theodor Hesselmann since March 2007, will succeed him as sole managing director.

PLANATOL traditionally belongs to the graphic arts industry; under the leadership of Theodor Hesselmann they extended their know-how to other markets. In the year 2000 the company invested in the adhesive tape manufacturer BIOLINK and in 2005 they took over the PLANATOL Milker Adhesive, a manufacturer of PSA-adhesives for the coating sector. Today, the company group covers a wide spectrum in the gluing technology segment and supplies the graphic arts, sign, label, automotive, construction, adhesive tape, aircraft, glass, plastic and textile industries. Now, at 68, Theodor Hesselmann’s active time as manager has come to an end and in the future he will continue to exert his influence as a member of a strong, well-informed advisory board.

In a demanding selection procedure PLANATOL decided in favour of Michael Böddeker (48) to succeed Theodor Hesselmann. Michael Böddeker has studied business management. He worked for Agfa Gevaert, Lufthansa Air Plus and Sachtleben Chemie. At Pfleiderer group he managed several subsidiaries. Since March 2007 Michael Böddeker has shared the company’s management with Theodor Hesselmann. The dual management was an intentional step in the leadership change enabling the “new managing director” to benefit from the unparalleled experience of his mentor.


Theodor Hesselmann (right side) and Michael Böddeker (left side)

SEKISUI ALVEO AG – SWITZERLAND

In September 2007 Mr Giona Kilcher started his assignment as Technical Manager in the Business Unit Adhesive Coating at Sekisui Alveo AG. He is responsible for technical support and application development for the specialty tape market.

Sealing tapes improve energy efficiency in buildings
Polyolefin foams as a cost-effective alternative
“There’s a draught in here!” As soon as winter arrives, it quickly becomes clear how well – or how badly – doors and windows are insulated. The traditional method of preventing this is to use foams made of PUR (polyurethane) or soft PVC (polyvinylchloride) as sealing materials. Compared to these materials, the innovative foam product Alveo-Soft offers much lower air permeability at different levels of compression. The very soft and adaptable foam is also much thinner. Its soft consistency means that only low closing forces are needed even for irregular gaps.
Tape manufacturers who use Alveo-Soft as sealing tapes or integrate it directly into their application benefit from the lower thickness of the foam: it reduces material, production and storage costs. For constructors, the lower closing forces make assembly easier. For example, using the new sealing material means that less effort is required for constructing a building with sandwich wall panels. The lower closing forces also allow an easier installation of ventilation ducts. For the end user, the noise and heat insulation provided by the sealing tapes reduces heating and air conditioning costs. Energy efficiency is optimised and noise is reduced. Furthermore, the low air permeability reduces the possibility of condensation, thus preventing fungi.

In addition to sealing tapes, Sekisui Alveo also develops solutions for adhesive coatings. Alveolit UTF 200 (Ultra Thin Foam) is one of the world’s thinnest foams used in adhesive tapes. The foam is a cost-saving alternative to conventional adhesive tapes in which the carrier material usually consists of a film. Alveolit UTF 200 requires much less adhesive, as it is much more flexible in adapting to the substrate. At the same time, adhesive tapes with this foam still achieve very good adhesion results.
Due to the weight saving potential for the adhesive, which can be up to 25 percent, this foam type helps to lower production costs. What is more, because less solvent is used, emissions are lower, thus benefiting the environment.

CAPTAINS OF INDUSTRY SPEAK

PART II OF A SPECIAL 50TH ANNIVERSARY SERIES

EMILIO ANGELI, FORMER AFERA PRESIDENT, CAREER TESA MANAGER AND INDEPENDENT CONSULTANT

How did you start working in the self adhesive tape business?
After working in an Italian mechanical company producing bread-baking ovens in the mid-60s, I moved to Germany, learnt the language and found work in a small iron mill in Munich. Times were hard, and the work was hard. I stayed there for about 4 years and in 1969 went to Beiersdorf – tesa Italy. The Italian branch of the company was searching for mechanical engineers with knowledge of German and willing to work a lot for little compensation.

So you started working in the tape business when you were recruited in Italy?
The economic situation in Italy was improving, and it was the end of the sixties. I answered a call from tesa for one technician. Following the interview, I was offered the job immediately. Probably because I didn't ask how much I would make! At the time it was Beiersdorf, which was later split into different companies. I thought I'd stay working at tesa for only a few years, and after 40 years, I am still there.

You seem very busy for someone who is supposed to be retired?
Are you currently involved in extra projects? I started in tesa in the late sixties as an application advisor, and then I went to marketing as product manager, then to consumer products, then to marketing and sales manager. Then in '88-'89, I was assigned a special project: a merger. We acquired the largest Italian producer at the time, and I was there, near Como, for about a year in order to put together the merger. Then I took over full responsibility of the new company, tesa Comet, until 1997.

Following this, I became a gypsy again and for three years was business unit manager in Hamburg with world-wide responsibility for packaging and part of the consumer business. And then from '00-'04, I was responsible for tesa's Eastern European business, building up a new region including 25 countries. I created a dozen tesa companies there. In five years, the turnover increased and results were positive. So it wasn't too bad. And then I retired.

So you've retired at a great high?
Thanks to the company, most times my results weren't bad. And then from the beginning of '05, I started working as a consultant on special projects for my boss, tesa CEO Dieter Steinmeyer, whom I met when he joined Beiersdorf to reposition tesa in 1990.

How have you seen the tape business change since you started working?
In 1969, tape solutions were not so popular and considered expensive. When I joined tesa Italy, our price list consisted of no more than 20 or 25 products. Today, tesa's pricelist consists of at least 600 tapes – different sizes, different colours and so on. Tape solutions are ever becoming more important, because tapes are no longer evaluated as in-between solutions. Today adhesive products are seen as valuable technical tools used to solve technical problems.

Do you see these changes as positive?
The fact that some tape producers started out 30 or 40 years ago focussing on one tape, such as packaging tape, and today focus on every type of tape *but* packaging tape says a lot of good about how the industry has evolved. This is also a good sign for the future. The adhesive tape business is able to regenerate itself because we are continuously introducing new products for new applications, for new technical solutions.

What is your favourite aspect of working in the tape business?
First of all, that you don't have any limits to the market. Endless opportunities are waiting for the flexible and curious. The applications of tapes are so diverse and generalised today that you can apply adhesive to anything and invent all sorts of new applications. I always say to the young sales people when I am training them: be careful, if one tape comes onto the market meant for one application, normally more than 50% of the actual application of the tape is completely different from the original application for which the tape was developed.

What do you think has been the secret of tesa's success?
There are different ways to focus on the business. The normal American way is to focus on the *product*. For a German company, the product is important, but the *people* who use it are much more important still. This is one of the reasons for tesa's success especially over the last ten years: tesa strives to partner with its customers, to find solutions to their daily needs and problems.

In which direction do you see the tape market moving in the future? Where will it be in 10 years? 20 years?
I think tapes will become increasingly important in the fixing area because the quality and limits of the tapes are increasing continuously. Ten years ago, double-coated tapes were used more or less for adhering carpets or for stereo mounting in the printing industry. Today double-coated tapes are used for hundreds and hundreds of applications: fixing parts in the automotive industry, in airplane production, etc. Reliance on tape is increasing because the quality of tape is increasing, and this trend will continue in the future.

In terms of volume, I think the tape market will grow slowly, in line with GDP, 2-3% per year and not much more. The *value* will increase much more. So the mix of the products used in the future will be completely different than that of today. This is the reason leading companies are investing a lot of money in R&D.

Do you see the European tape industry consolidating into a few large tape producers in the future?
There is a lot of room in the market for very small companies specialising in niche markets and very large companies. I think medium-sized companies will face more and more problems in the future. Either they will be absorbed by larger companies, or they'll be forced to merge with other companies. Either you have small, family companies which can be managed simply by limiting costs, or you must use your resources in the best ways. You must continuously reduce your fixed and variable costs, because the customers are more and

more conscious about the market situation. They are more often asking for cost reductions. Today, to have a sales force costs a lot of money, and a medium-sized company is hardly able to absorb these kinds of costs.

In terms of commodity tapes such as packaging tape, will customers always look for the cheapest product to satisfy their needs?

No. Of course, customers constantly ask for better prices, but end-users are not so concerned with relatively small price differences. What the end-user is focussed on is having the best adhesive solution for his problem, in line with a consistent level of quality of the product. Sometimes end-users reject cheap tape because they don't want to risk inconsistencies in quality. This would ultimately result in too high a price paid in the larger scheme of the production of their products. Consistency of quality is normally not a point of strength of cheap tape products.

Do you agree that tape production in industrialised regions will continue to grow in line with GDP, while that of the Asia Pacific Region (incl. China) will exceed GDP?

I think growth in volume will follow GDP at 2-3%. But the growth in value will be completely different, because the mix of the products sold is improving daily.

Do you think solvent technology primarily based on natural rubber (and/or acrylics in the case of specialty tapes) will continue to be the most-used coating technology in Europe with 2.9 billion square meters (52% of total production in Europe)?

Yes, there are important quality reasons for this. Especially in Europe, the environmental issue is becoming more salient. Tape producers are under continual pressure to reduce solvent emissions in production. Companies are constantly pressured to find alternative technologies, but for some high performing tapes today, solvent born is still the sole practical solution.

In the European carton-sealing business today, hot melt is one of the most important technologies used. But hot melt also has its limitations in terms of large quantities produced. For this reason also, here in Europe there are some companies choosing water-borne technology. Water-borne technology is still environmentally friendly and the equipment produces lower, more marketable quantities.

What is your view on the use of hot melt technology as related to the globally-limited SIS supply as of 2005?

Do you think solvent coating will continue to fill the gap in Europe? That changes from year to year. We have to adapt ourselves to the available supply of the market, but I don't think the impact of a shortage would be such that we would need to modify the type of technology used. We are not really big users of synthetic or natural rubbers. For rubber producers, the tape business is a rather insignificant player in the market.

Do you see raw materials availability on a global level characterised as a balanced supply-demand situation in the future?

I think so. We will not have a shortage in the future. We will only have to buy at higher prices, because, as I said before, the priority market for these suppliers is, for example, the tire market and the technical rubber market, and not the tape market at all.

What do you think are the implications of REACH on your business?

In terms of raw materials, REACH will greatly impact the European market. As we have seen over the last two years, many suppliers have arrested production of chemicals, because complying with REACH regulations was too expensive. And then in the last couple of years, one of the most important issues in R&D – not only at tesa but at a lot of companies – was figuring out how to substitute these discontinued chemicals. We've spent a lot of time, money and energy on researching ingredient substitutions.

In the future, we will see the development of more regulations with which we will have to comply. Even REACH just takes into consideration components (and tapes are not components but products). We have to remember the case which arose a few years ago about safety sheets with which we had to work to comply. But I think in the current case, Afera has greatly helped the tape industry by establishing a common starting point from which to confront European legislation such as the European Chemicals Policy.

In your view, how important is the exchange rate of the U.S. dollar versus other currencies important to your business and the European tape industry in general?

A little bit. Our friends at 3M are really enjoying the current situation. They are becoming even stronger in the European market, because they are offering many U.S.-dollar-based prices, especially to Eastern Europe. During my time in Budapest, I was slightly effected by this situation. But it's cyclical; it all comes out in the wash. In any case, good competition obliges you to find a solution. Competition can be good because it forces self-improvement.

In your view, what will be the European tape industry's greatest challenge in the future?

First, to reduce fixed and variable costs. Mainly fixed- and also variable- because competition is increasing in the internal European market. More and more companies are producing speciality tapes, so they must strive to be frontrunners with R&D – innovative products, innovative solutions – but you must also be very cautious with your costs. This is also why small companies will remain small, dedicating themselves to very, very small niches, without investing in distribution, sales and logistics. And other companies will consolidate into fewer companies in order to limit their distribution costs as much as possible.

Second, to confront environmental regulations. We will come up against an increasing amount of European legislation. Solvent emissions were first, but other issues will come up in the future.

What has your relationship with Afera been like?

I became involved with Afera more than twenty years ago. I have been Afera President twice, once as the Italian Regional Representative and once as the Eastern European Regional Representative, totalling more than five years. I have been on Afera's Steering Committee for a lot of years. And I was one of the facilitators of the move of Afera's Secretariat from Paris to The Hague. I will retire from Afera at its 50th Conference in Barcelona. My place on the SC will be taken by a former colleague from Eastern Europe, Renata Klamka. It's time to welcome new blood into Afera's leadership.

How has Afera benefited both tesa and the general tape industry?

Afera has helped us especially in the area of test methods. I think Afera is very useful for tape companies, because it can represent our industry in important public affairs matters such as environmental regulation. Top-level market studies and evaluations have become increasingly important. To have well-informed competitors is much better than having misinformed competitors. If they are well-informed, tape producers will plan and act more intelligently. Afera offers our industry the possibility of creating fair, open competition and sharing what they want to share. No more, no less.

What are your views on the possible formation of a 'Global Tape Alliance'?

I would welcome it, because ultimately I think the tape business is very insignificant in size if viewed globally. Allying with other regional industries would only strengthen the industry in terms of its handling power with customers, in various markets and in public affairs.

ANTONIO RIGHETTI, FOUNDER AND CEO OF NAR

How did you start working in the self-adhesive tape business? In 1960, I was 24 years old and started working in a company that both traded and printed self adhesive tapes.

How has the tape business changed since you first started working?
As in all industrial sectors, there have certainly been many changes. Unfortunately, I cannot say that they have always been favourable, but generally they have not had a negative impact. I would say that besides production processes, the one aspect that has much evolved has been the products distribution system.

Do you see the changes as positive?
I consider them generally positive. However, this opinion is based on the assumption that a company's projections are mid-to-long-term, as they are catalysts for evolution and improvement.

What is your favourite aspect of working in the tape business?
The evolving dynamics of production technologies.

What do you think has been the secret of your success?
Of Nar's success? Perseverance, enthusiasm and the capability of involving our team members.

What do you think has been the most important innovation of the (European/global) tape industry in recent years?
The most important innovation has surely been the possibility of making use of all the adhesives technologies in recent years. These were already well-known but not available with the same facility and flexibility as in recent years.

In which direction do you see the tape market moving in the future?
Where will it be in 10 years? 20 years? It is difficult to forecast for such a long period. In the short run, the topics discussed will include alternative energies and new materials. However, I do not see important changes coming about in the next 5 years.

Do you think the Asia Pacific region will continue with 50% of the global production volume? And the Americas and Europe together around 25% of production volume?
I think there will be a greater balance; I mean that the Americas and Europe will try to curb this expansion rate.

Do you agree that tape production in industrialised regions will continue to grow in line with GDP, while that of the Asia Pacific regions (incl. China), will exceed GDP?
One may agree with this assertion. On the other hand, in the Asiatic GDP the industrial component is higher than that in the European Community.

Do you see the annual global production rate of around 6.5% continuing at that level?
Yes, it is now possible to forecast this, even though the estimate could be altered by destabilisation elements, such as socio-political factors in some countries.

Do you think packaging tape will continue to represent the bulk of tape production volume in Europe in the future?
Certainly. I do not see advantageous alternatives to the use of the packaging self adhesive tape. This will continue to represent the predominant production volume in the years to come.

Do you think solvent technology primarily based on natural rubber (and/or acrylics in case of specialty tapes) will continue to be the most-used coating technology in Europe with 2.9 billion square meters (52% of the total production in Europe)?
With the current balances between cost levels and the installed production capacity, I think this is still possible for a few years. Anyway, the solvent coating plants generally work close to their maximum capacity. A technical substitution or a potential higher market request could be met mainly with hot melt or water-based installations.

What is your view on the use of hot melt technology as related to the globally limited SIS supply as of 2005?
Do you think solvent coating will continue to fill the gap in Europe?
The crisis of SIS availability has been overcome. Anyhow, this negative situation which moreover was sufficiently compensated by the other technologies in 2005, could recur for SIS as well as for other raw materials. Capacity and flexibility in using the various technologies will therefore become increasingly important.

Do you see raw materials availability on a global level characterised as a balanced supply-demand situation in the future?
I think so, as this is naturally desirable.

In your view, how important is the exchange rate of the U.S. dollar versus other currencies to your business and the European tape industry in general?
An unbalanced euro-dollar exchange rate also damages our sector. I confirm the great importance the exchange rates holds and therefore the major attention which should be paid to this factor.

What do you think are the implications of REACH (and any other environmental legislation) on Nar?
The tape industry in general? I certainly agree on legislation that involves the European states in such an important, sensitive issue. The adhesive tape sector could be particularly damaged, in some cases, by extra-European competition which should be made to conform to common standards.

In your view, what will be the European tape industry's greatest challenge in the future?
The most demanding challenge will be to produce well at competitive costs, for instance compared to Asiatic costs, while maintaining the quality level of products and services.

If you could change one thing or wish one thing for Nar or for the tape business in general, what would that be?
My wish would be to have significant, harmonised regulations amongst the manufacturing companies, and in this Afera could actively contribute.

What has your relationship with Afera been like?
Excellent. My company has been a Member of Afera for a very long time.

Has Afera benefited your company in any specific way?
It has definitely contributed to improving industry culture, technique and knowledge, as well as widening international outlook, which is one of Nar's traits.

In your view, what has Afera done for the tape industry?
It has already done a great deal. In my opinion, greater collaboration of all the self adhesive tape manufacturing companies would institutionally improve and strengthen the tape sector.

What are your views on the possible formation of a 'Global Tape Alliance'?
It should be the greatest goal of the European tape industry. Globalisation is a current topic and a world tape council would certainly add an array of advantages to the global tape industry.

REGULATORY UPDATE REACH

Under REACH (Registration, Evaluation and Authorisation of CHemicals), the burden of proof for demonstrating the safe use of existing chemicals has been transferred from the EU Member States to industry. REACH aims to ensure that risks to human health and the environment are avoided or adequately controlled. The legislation effects not only manufacturers and importers of substances, but producers and importers of preparations, 'downstream users' of substances and preparations, and the producers and importers of articles. To each of these roles are attached different and often far-reaching obligations.

Under the complex, expensive, yet revolutionary **European Chemicals Policy**, all substances marketed at or above one tonne must be registered in a central database administered by the new EU Chemicals Agency, irrespective of whether they are classified or not. A technical dossier must be prepared once the quantity of a substance alone or in a preparation exceeds the 1-tonne threshold per manufacturer or importer per year and a CSR (chemical safety report) if the quantity exceeds the 10-tonne threshold. If the quantity exceeds 100 and 1,000 tons per annum, much more extensive testing is required. Some 30,000 different substances lie within the scope of REACH.

The use of very hazardous chemicals, 'substances of very high concern', will be subject to an **authorisation system**. This concerns substances in the categories: CMR categories 1 & 2 (substances that cause cancer, genetic mutations or reproductive problems), PBT (persistent, bioaccumulative and toxic) and vPvB (very persistent and very bioaccumulative).

REACH was adopted in December 2006. REACH Regulation (EC) No. 1907/2006 and Directive 2006/121/EC amending Directive 67/548/EEC were published in the Official Journal on 30 December 2006. **REACH entered into force on 1 June 2007.**

COMPLIANCE

The first task of compliance for manufacturers, importers and users of relevant substances is engaging in the administrative process of **'pre-registration', which distinguishes between 'phase-in substances'** and new substances. The higher the annual volume marketed, the sooner a chemical must be registered; **by 2018 all substances must be registered. REACH implementation projects (RIPs)** have been launched to facilitate timely compliance with the new legislation. The new **European Chemicals Agency** must be **fully operational 12 months after the legislation enters into force.**

INTER-INDUSTRY REACH PROJECT

In Spring 2007, Afera joined a **newly-formed REACH Inter-Industry REACH Project** which includes five other trade federations from related industries, **FINAT (international organisation for the self adhesive labelling industry)** and **FPE (Flexible-Packaging Europe)**, and to a smaller degree, **FEDES (the European Flexible Packaging Federation), Intergraf (the international confederation for printing and allied industries) and ECMA (the European Carton Makers Association)**.

The members of these associations and federations all represent 'downstream users' of chemicals in printing and packaging. Participating in this initiative will create a larger pool of in-house experts from which to draw knowledge and support for Afera members in the process of conforming to the European Chemicals Policy legislation. The financial costs of the Inter-Industry Project are being divvied among the 6 trade federations.

The **goals** of the common REACH Project:

- Production of a **'roadmap'**. This will serve as a guide to the REACH legislation and the technical guidance notes for all member companies encompassed by the Inter-Industry REACH project trade federations. Most importantly, the Roadmap will advise member companies on how best to prepare for the implementation of REACH.
- Development of **common positions on high-impact issues**: Even though REACH has now been enacted as law, a number of politically sensitive issues must still be tackled. These issues will be addressed on a European scale through the **RIPs**.
- **Co-operation with supplier federations** such as CEPI (paper), Plastics Europe, FEICA (adhesives) and CEPE (inks). These federations are also in the process of preparing themselves for REACH. Useful information and ideas will be exchanged.
- **Advocacy within the RIPs**. The outcome of several RIPs (3.2 and 3.8) will effect the member companies of the Inter-Industry REACH Project. The common working group will closely monitor the progress of the Technical Guidance Documents (TGDs) and actively participate in those processes where appropriate.

EXPERT WORKING GROUP

A dedicated **REACH Expert Working Group** has been formed **of representatives of member companies of the six trade federations** (who are themselves responsible for the implementation of REACH within their own companies) and chaired by **Paul Verspoor of Sitmae Consultancy (NL)**. Engaged via L.A.M., **Constantijn Horak of FEDES** is serving as secretary for the WG. Afera's WG representatives include **Wynne Lewis (3M), Mike Konieczko (Advance Tapes), Herman Delsiene (Nitto Europe) and Dirk Lamm (tesa)**. Mr. Verspoor has explained that the Project will take place over 2007-2008, as it is too large to be completed within one calendar year.

ROADMAP

Meeting for the first time on 29 May 2007, the WG established its immediate intention to produce **a first draft of the Roadmap**.

The working draft of the Roadmap Part I, which is currently under review, consists of the following goals:

- Communication with customers to assure them that everything possible is being done to preserve continuity of the production processes.
- Complete pre-registration of all substances used as ingredients in all the materials that are produced/obtained before 1 December 2008. Only pre-registered chemicals will be considered 'phase-in substances' and can thus enjoy the time delays for registration under REACH.
- Determination of relevance of REACH to each company. Estimate the resulting burden a company has to comply with the legislation. Investigate alternative policies (primarily in purchasing, but possibly in manufacturing and selling) that may reduce this burden. Plan and execute any changes in purchasing policies.
- Identification of potential problem areas (inexhaustive). Identify potential problems arising from (1) purchasing material from suppliers who cannot be depended upon to adequately prepare for REACH themselves, (2) using Substances of Very High Concern (SVHCs), and (3) using purchased or obtained materials (substances, preparations or articles) for other purposes than foreseen or intended by the supplier. This will reduce or prevent the impact of substance de-selection and consequently reduce the impact on the (formulations of the) products manufactured by the member companies and prevent the need for customers to buy their products from outside the EU.

Part I of the draft Roadmap concentrates on the issues which need to be addressed most urgently. One of these is ensuring that all substances used by member companies and their suppliers will be pre-registered when required. This is crucial in preventing these substances being taken off the market by the end of 2008.

On 11 September 2007, Afera S-G Astrid Lejeune sent **a letter of high importance** to all Afera Members informing them of the Inter-Industry REACH Project's initial aim and explaining that in its final shape, the **Roadmap** will consist of **action plans, decision making tools, explanatory documents, templates for an inventory of purchased materials and templates for communication with suppliers and customers.**

As laid out in detail in the working draft of the Roadmap Part I, Afera members were strongly encouraged to take immediate action in the following Steps: **(1) setting up REACH preparation teams, (2) collecting relevant information, (3) assessing their vulnerabilities with relation to implementing REACH, (4) assessing the adequacy of suppliers' preparations for REACH, (5) identifying companies' REACH roles and (6) identifying potential problem**

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areas. More detailed preliminary descriptions of the points on the action list are available at afera.com. The **finalised Roadmap Part I**, set for issue in **November 2007**, will include guidelines on the timing of all the necessary stages of compliance.

RIP 3.8

As mentioned above, Afera is also participating in **RIPs**, most recently **3.8 'Requirements for Substances in Articles'**.

RIP 3.8 initially classified adhesive tapes as 'articles with an intended release', in the same category as inkjet cartridges, aerosol bottles, perfume bottles, etc. In January 2007, a subcommittee consisting of **Wynne Lewis (3M), Mike Konieczko (Advanced Tapes), Herman Delsiene (Nitto Europe), Dirk Lamm (tesa) and Mr. Verspoor**, met and vigorously prepared input into the EC Working Group (SEG – Stakeholders Expert Group) to the effect that **tapes are 'articles without intended release'** (except when, for instance, a perfume or a medicine is added that is indeed intended to be released), Afera's official standpoint. As the SEG was still finalising the classification of adhesive tapes for REACH (Articles 7 and 32(4)), the Afera subcommittee was hoping to affect a positive outcome for tape producers and importers with respect to the description of adhesive tapes in the **Draft Technical Guidance (DTG) document. This was achieved.**
In the meantime, the RIP 3.8 DTG document was finalised in 2007, but the Member States did not endorse the final report.

On **3 October 2007**, a **Competent Authorities – Commission Working Group (CWG) meeting** convened to update the DTG in terms of (1) 0.1% threshold triggering notification obligations and (2) borderline cases between articles and substances/preparations in a container.

Discussion concerning the tape industry then focussed on whether tape is simply an article or a 'substance or preparation on a carrier material' (to be registered under Art. 6). On behalf of Afera and FINAT, Mr. Verspoor provided comments and proposed criteria to distinguish between the two.

Accordingly, the current **documents state that 'tapes that are actually meant to delaminate and put substances-preparations on a surface are considered as substances/-preparations in a carrier material (e.g. tapes designed for applying wax on skis). If the adhesive layer stays on the tape, it will be considered as a substance or preparation in an article.**

The following are examples of tapes and similar products that will be considered 'preparations on a carrier material':

- Adhesive mastic in tape form
- Performed sealants on a roll
- Putty for windows
- Poster and paper mounting products
- Materials other than adhesives with backing
- Wax tapes for skis
- Thermally-activated tape and bonding films
- Bonding films for aerospace.

The **classification of double-sided tapes** produced some debate. They 'de-laminate' but are clearly not a preparation on a carrier material; double-sided tape is very different from an adhesive in a pot. Mr. Verspoor therefore proposed, on behalf of the tape industry, the following description: 'Tapes are articles unless they delaminate **and** upon application will change shape.' The Member States ultimately objected to the addition of the latter criterion as they feared that it might have consequences that were unforeseeable at that time. There was, however, full agreement on the fact that double-sided tapes should not be regarded as 'preparations on a carrier material'.

In terms of the tape industry's interests, the final agreement of the 3 October meeting centred upon the exclusion of the additional 'upon application will change shape' criterion, and alternatively, the making of an explicit exception for double-sided tape. Going forward, Mr. Verspoor will assist the CWG in determining the correct wording of this exception for the RIP 3.8 DTG document. Caution will have to be exercised in drafting this wording so as not to include all sorts of non-tape products (such as labels) that do 'de-laminate' but are still articles, in the exception.

An EU Commission consultant will officially update the DTG based on the final agreement of the CWG subgroup. A final SEG meeting will take place later in Autumn 2007 to make concluding comments on the DTG document but not to re-enter discussion on 'borderline cases'. **RIP 3.8 is expected to be finalised at the end of the year.**

RIP 3.2.2

Afera and FEICA participate in **RIP 3.2.2: 'Exposure Scenario Exemplification Studies' for REACH**, led by Dr. Tolls of Henkel. Afera's representative for this project is **Dr. Dirk Lamm of tesa**. Several RIP 3.2.2 workshops have already taken place to work out procedures for exposure scenarios on relevant examples, the findings of which may also be utilised by Afera members.

FEICA's self-developed Case Study 'Standardised Method for Exposure Scenarios' (including its planned FEICA Exposure Scenario Tool) for the final report of RIP 3.2.2 was presented in March 2007. Its basic outlined principles of consolidation, risk-determining substances and scaling were accepted by the Commission. Some remaining details are still under evaluation. FEICA's software tool, which is under development, is based on a commonly-agreed system by stakeholders, will save time by a factor of ten and retain the confidentiality of information.

Dr. Lamm will attend the next meeting which deals with the development of a DTG document for preparing the Chemical Safety Report.

VOCS AND OTHER AIR QUALITY ISSUES FOR SOLVENTS

The status and future challenges of air quality regulations in Europe was the subject of a lecture delivered by **European Solvents Industry Group Secretary General Dorothee Arns (B)** at last month's Annual Conference in Barcelona. The ESIG's mission is to support the sustainable and responsible use of oxygenated and hydrocarbon solvents through dialogue, information sharing and solutions that address health, safety and environmental aspects. The ESIG promotes 'best practises' across the European industry, advocating and communicating on issues effecting producers and implementing responsible care and product stewardship.

The European solvents industry is committed to meeting the highest safety standards and environmental protection. It spends over € 20 million per year on research and development. The solvent producing industry is composed of both SMEs as well as multinationals. Downstream users generally tend to be SMEs and micro-SMEs.

The ESIG estimates that the solvents industry, consisting of over 30 solvent-producing companies, employs over 10,000 people throughout Europe. Solvents manufacturers across Europe have an estimated combined turnover of about € 2.5-3 billion, and annual sold volumes total approximately 5 million tonnes. Over half a million European companies, ranging from pharmaceutical to agrochemical and paint producers, are solvent users. These companies have a combined turnover of € 200 billion and employ more than 10 million people.

ES VOC-CG

The **European Solvents VOC Co-ordination Group (ES VOC-CG)** is a cross-industry group of producers, downstream users (trade associations) and national chemical associations, incorporating over 25 solvents user groups. ES VOC-CG focuses on issues effecting the producers and the users of solvents. It develops joint positions on any piece of legislation related to VOC (Volatile Organic Compound) emissions and works on matters such as occupational diseases, classification, storage, waste management and transport.

The mission of the ESIG and ES VOC-CG is to facilitate the implementation of existing legislation aimed at reducing VOC emissions to air and in the workplace; develop joint positions on directives impacting the use of solvents; facilitate the collection of data to support scientific programmes, studies and surveys led by European authorities; facilitate the communication between European authorities and downstream users; and promote best practices of handling solvents throughout the supply chain and in the workplace.

The ESIG brings together **31 member companies from across Europe**. Its Steering Committee includes representatives from seven of those companies (BASF, Dow Europe, ExxonMobil Chemical Europe, Ineos, Lyondell, Shell Chemicals and Total) who manage the Group's activities and report back to the other members regularly.

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CURRENT AIR QUALITY CHALLENGES

Ground level **ozone** is formed when NOx (nitrogen oxide and nitrogen dioxide) and VOCs react with sunlight and heat. VOCs make up one of the greenhouse gases responsible for the global warming problem. They impact health by causing inflammation of the lung passages and subsequently, breathing difficulties; and have transboundary effects.

Particulate Matters (PMs) emerge from oxidation processes in the atmosphere. There are two types: primary PM, from combustion, dust and spray; and secondary PM, such as secondary organic aerosols, formed by the oxidation of VOCs. The related health impact is thought to be that the smaller the particles, the more damage to the lung, the cause of more concern than ozone-related health risks.

SOURCES OF LEGISLATION

The extent to which NOx and VOCs participate in ozone formation varies. In order to develop efficient strategies to improve air quality, the EU industry is working on reducing emissions as well as understanding what contributes the most to ozone formation. Reducing NOx would appear to be the most effective way to continue to reduce ozone levels in the EU.

The **EU, consisting of 27 Member States, produces legislative directives** which contain orders that are monitored and enforced and penalties for MS if they are not enforced. The **UNECE (United Nations Economic Commission for Europe), consisting of 48 Member States (including the U.S.A. and Canada), produces protocols** which contain strong recommendations for all UN MS to follow.

GOTHENBURG PROTOCOL

The UNECE adopted the Protocol to Abate Acidification, Eutrophication and Ground-level Ozone in **Gothenburg, Sweden, on 30 November 1999**. The Protocol sets emission ceilings for 2010 for four pollutants: sulphur, NOx, VOCs and ammonia. The **Protocol is being revised in 2007** and is expected to be aligned with NEC. The ESIG/ES VOC CG ensures communication of scientific developments to Protocol representatives, and the CG is working to finalise its advocacy position in Q3 2007.

NEC

The National Emission Ceilings (NEC) directive (2001/81/EC) sets upper national emission ceilings for each MS for the total emission in 2010 of the four pollutants responsible for acidification, eutrophication and ground-level ozone pollution (SO2, NOx, VOCs and ammonia). The EU Commission proposed in Q1, 2007, to **revise the directive by Q1, 2008**. No additional restrictions on VOCs are foreseen. The ESIG will begin the process of engaging with politicians and advisors in the European Parliament.

SED

The Solvent Emissions Directive (SED)(1999/13/EC) concerns the limitation of emissions of volatile organic compounds due to the use of organic solvents in certain activities and installations. **Published in 1999, the deadline for compliance is October 2007**. SED is a major achievement for ESIG, because the Group has worked with the EU on this issue since the late 1990s. The ESIG is proud of its cost-effective approach, which ensured business alignment and competitiveness. Furthermore, the Group is helping its members and the solvent-using industries to implement it by monitoring the process.

IPPC

The European Commission is currently reviewing the IPPC Directive (complex environmental permits for many different industries, including those with a solvent consumption of over 200 t/a). A draft for a new Directive is in the process of Interservice consultation, meaning that other E.U. Directorates get a chance to review the Draft and submit their comments.

The Draft combines the original IPPC Directive with several other environmental directives, amongst which is SED. ES VOC-CG, and more particularly its working group on IPPC and BREF, is working on the issue on behalf of the solvent-consuming industries.

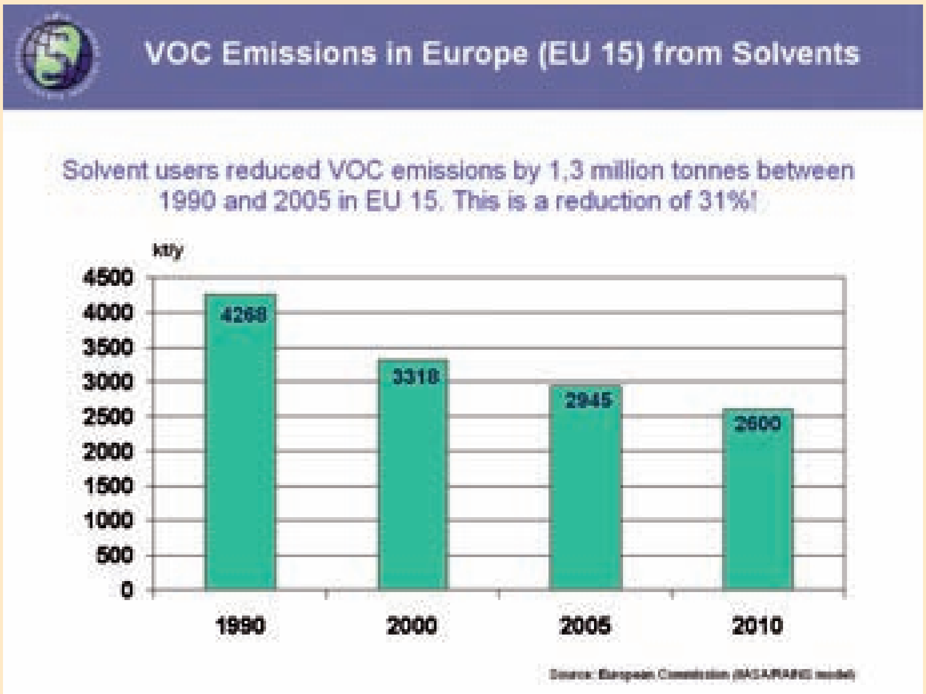
FUTURE AIR QUALITY CHALLENGES

The American approach to reducing VOC emissions has been mainly focussed on 'reactivity', i.e. only the most reactive VOCs are controlled. They have only begun to take PMs into account. On the other hand, the EU has pursued mass-based VOC reduction across the board, have long considered the PMs issue and even take the cost-effectiveness of measures into account.

According to Mrs. Arns, tackling the **global warming** issue is a future challenge and will focus on carbon dioxide reduction in Europe. Emissions from vehicles and combustion processes must be reduced significantly. In this regard, links between air quality and global warming and ozone will be scrutinised.

PMs from diesel engines also poses a challenge for the future, in terms of targeting new engine technology, fuel reformulation, additives, maintenance and inspection, and traffic management.

Emissions Trading is also a future item on environmental agendas. Whether between two different industries within a country or between two MS, a trading programme stipulates a price for each ton of emissions. Each industry or country that achieves more reductions than its quota is assigned an appropriate credit. The 'under-emitters' can sell their credits to 'over-emitters' at the market rate. The advantage of this programme is that both parties benefit and have an incentive to reduce emissions.



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JANUARY 2008

16 – 18	International Converting Exhibition, Shanghai, China

FEBRUARY 2008

6 – 7	Pharmapack, Paris, France

MARCH 2008

2 – 5	APEX, Cairo, Egypt
5 – 8	Sign Ireland, Dublin, Ireland
6 – 7	FINAT Technical Seminar, Barcelona, Spain
10 – 12	Middle East Coatings Show 2008, Dubai, UAE

APRIL 2008

1 – 3	FESPA, Geneva, Switzerland
7 – 10	Etiketka/ LabelShow 2008, Moscow, Russia
9 – 11	Afera Technical Seminar 2008, Brussels, Belgium
10 – 14	Cosmopack, Bologna, Italy
20 – 23	World Adhesives Conference & Exposition, Miami, Florida
23 – 24	Korean Coatings Show 2008, Seoul, Korea
24 – 30	Interpack, Düsseldorf, Germany

MAY 2008

5 – 9	2008 Week of Learning, Tape University and 31st Technical Seminar, Balitmore, Maryland
29 – 11 June	Drupa, Düsseldorf, Germany

JUNE 2008

11 – 14	ProPak Asia 2008, Bangkok, Thailand
18 – 20	FINAT Congress, Paris, France
24 – 26	Asia Pacific Coatings Show 2008, Kuala Lumpur, Malaysia

JULY 2008

1 – 2	Packaging Summit Europe, Amsterdam, Netherlands
9 – 11	ProPak China, Shanghai, China

COLOPHON

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